MODULE HANDLEIDING

Dynamische rapportage module V1

HROffice

HROffice Reports Report Design Guide, Revision 2

Preface

HROffice *Reports* enables you to easily access your databases directly and quickly transform raw data into useful and readily understood information.

With HROffice Dynamic reporting, you can:

- Extract the information you need from one or more related tables.
- Format data into tables, reports, charts, pivots, and gauges.
- View the resulting report in your Web-browser and then print it.
- Export reports in several formats, including Microsoft Word, Microsoft Excel, and Adobe PDF.
- Automate many processes through scheduling, sharing, alerting, batch processing, and caching

HROffice's point-and-click interface is designed for the standard business user, with Advanced options available for those with greater access and skill. Many users will never design reports, but simply make modifications to current core reports, or use drill-downs to start at a high level overview and click through to get to the required information.

This user manual will step you through each simple process in using *HROffice Dynamic Reporting,* and provide you with what you need to know to create your queries and reports. Any data that our application developer has included in the database can be accessible to you in creating *ad hoc* reports.
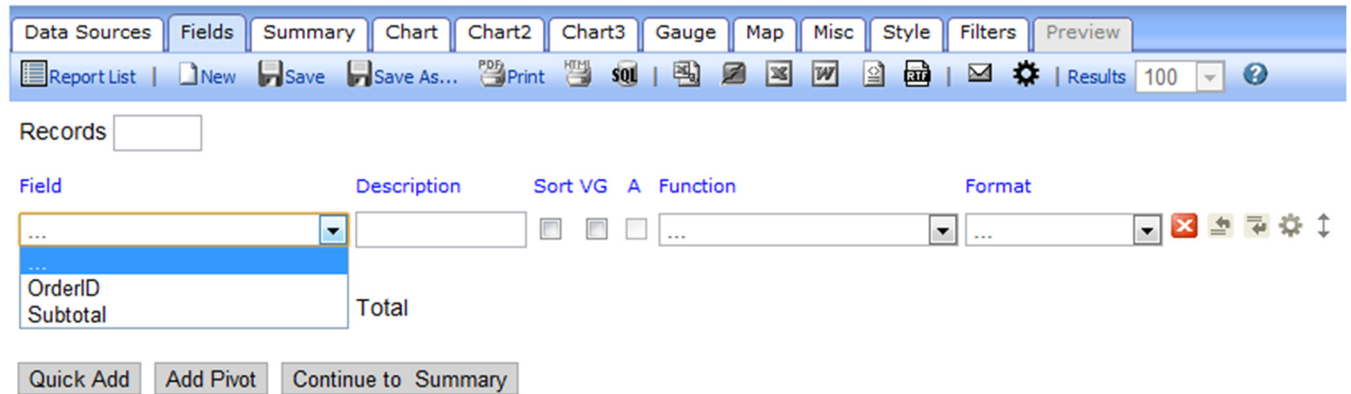
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2.0 Report Designer

The Report Designer lets you create new reports and modify existing reports. Usage of the designer functionality requires you to have followed the HROffice Dynamic Reporting training.

3.0 Report Viewer

The Report Viewer lets you easily modify a previously create report and save a variation, print it, export to various formats, and share it through email. No knowledge of the system is required.
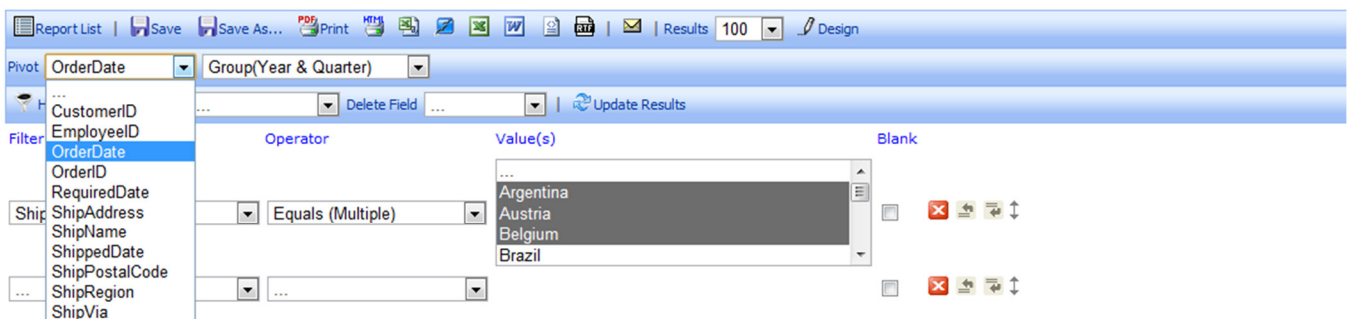
Finance Report
Financial Analysis of Freight Costs

Canada

Ship City	Total	2010-Q3	2010-Q4	2011-Q1	2011-Q2	2011-Q3	2011-Q4
Montréal	$1,394.22	$0.00	$88.89	$374.68	$203.27	$669.63	$57.75
Tsawassen	$793.95	$0.00	$47.42	$70.22	$62.89	$0.00	$243.73
Vancouver	$9.92	$0.00	$0.00	$0.00	$4.65	$0.94	$0.00
	$2,198.09	$0.00	$136.31	$444.90	$270.81	$670.57	$301.48

Mexico

Ship City	Total	2010-Q3	2010-Q4	2011-Q1	2011-Q2	2011-Q3	2011-Q4
México D.F.	$1,122.78	$103.67	$140.70	$83.49	$453.96	$86.07	$11.99

3.1 Building your first report – a quick start

- Navigate to the HROffice Dynamic report tool
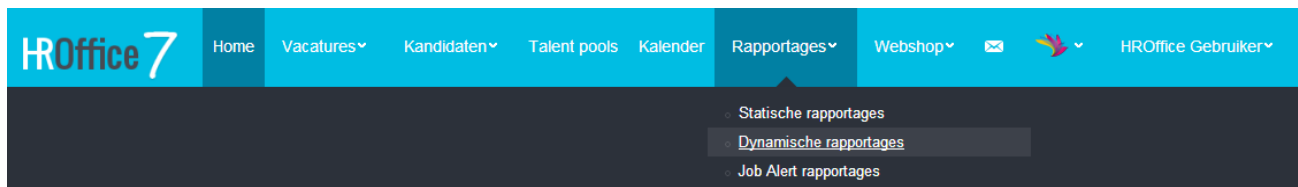
- Click the "Design A New Report" link

- Select a report data source in the "Data Sources" tab (the drop-down contains tables and views) like Invoices or Orders

- Select one or more fields, such as LastName, or VacancyID, from the "Field" drop-downs

Data Sources	Fields	Summary	Chart	Chart2	Gauge	Map	Misc	Filters	Preview

Report List New Save Save As... Print 📄 📊 W 📄 📄 Results 100 ▼

Records [   ]

Field	Description	Sort	VG	A	Function	Format
... ▼	[ ]	☐	☐	☐	... ▼	... ▼

...

vw_ReportCandidatesFull

Candidate-AvailablePer
Candidate-BIGNumber
Candidate-BirthDate
Candidate-City
Candidate-CountryId
Candidate-CountryName
Candidate-CustomFunctionId
Candidate-CustomFunctionName
Candidate-EducationLevelId
Candidate-EducationLevelName
Candidate-Email
Candidate-EntryDate
Candidate-FacebookAccount
Candidate-GenderName

ontinue to Summary

Data Sources	Fields	Summary	Chart	Chart2	Gauge	Map	Misc	Filters	Preview

Report List New Save Save As... Print HTML 📊 W 📄 📄 Results 100 ▼

Records [   ]

Field	Description	Sort	VG	A	Function	Format
Vacancy-Name ▼	Vacancy-Name	☐	☐	☐	... ▼	... ▼
Candidate-Name ▼	Candidate-Name	☐	☐	☐	... ▼	... ▼
Candidate-StatusName ▼	Candidate-Status	☐	☐	☐	... ▼	... ▼
... ▼	[ ]	☐	☐	☐	... ▼	... ▼

☐ Add Subtotals

[Quick Add] [Add Pivot] [Continue to Summary] [Preview]

- Click the "Preview" tab

- Click the "Save" button to save your report

- Enter a name and category(required, please use either Vacancies or Candidates as descriptions because otherwise nothing will be shown) in the "Save" dialog box

You now have your first functional report. This is a very basic example, and HROffice Reports offers far more capabilities.

3.2 The "Design a New Report" Link

Add new report

Design a New Report Link

This is a special link. Clicking this link takes you to the report designer where you can create a new report.

3.3 The View, Design and Modify Buttons

The view button [🔍] allows you to view a report.

The design button [Edit] allows you to make an advanced customization to the report by loading the report in the report designer.

3.4 Toolbar

Toolbar Buttons

The table below describes the functions of the Toolbar buttons.

Icons	Features	Description
Back	Back	Goes to the browser's previous page.
New	New	Creates a new report.
Save	**Save**	Saves a report.
Save As...	Save As	Allows a new report name to be saved.
Print	Print (PDF Export)	Saves the report as a PDF document.
GO	IE	Runs the report in the web browser.
	Schema	Display database diagram
SQL	SQL	Views the report in SQL mode.
	CSV	Saves the report as a CSV file.
	Excel Spread sheet	Saves the report as a MS-EXCEL file.
W	Word Document	Saves the report as a MS-Word document.
	XML document	Saves the report as a XML document.
	Open office document	Saves the report as an Open Office Document.
RTF	RTF document	Saves the report as a RTF document
	Back to Report List	Takes you to the Report List screen.
	E-mail	E-mails a report to a client
	Settings	Takes you to Settings.aspx page.

3.5 Report Design Examples

To give you a sense of feeling with the application have we setout some examples. These are not one-on-one applicable on your situation but provide a concept of the options available.

3.5.1 Designing a List of Vacancies per Location Report

Goal - The goal of this example is to create a report which lists all of the locations and a list of vacancies that are active, view the report by using the preview tab, name, and save the report.

Steps to create a new HROffice report -

1. Click on "Design a New Report".
2. Under the "Data Sources" tab - Click on the drop down arrow and choose "Vacancies"
3. Under the "Fields" tab - Click on the drop down arrow and choose "StandLocation". Leave the "Description" box as it is. (this will be discussed in another example).
4. Click on the "Preview" tab to see the HROffice report you just created.
5. Click on "Save as" tool bar button, name your report, for example "Example 1-1", and enter the category you want the report to be shown under, for example "Training", click ok. Now you have a saved HROffice report.

Note: This HROffice report shows you real time information. If you want to take a snap shot of the current results you can export the information. (Exporting will be discussed later)

Stand Location
Haarlem
Heemstede
IJmuiden
sadada

3.5.2 Adding additional fields, using field functions, using field formats, & sorting the data.

Goal - The Goal of the example is to add to the List of Vacancies per Location Report from the previous example, including the vacancyname, date of placing. Then we will sort the data alphabetically by Stand Location.

1. If you do not have the example open from before, then you will need to load it by clicking the link of the saved report, otherwise go back to the previous example.
2. Let's add some more information to the report other than just the Stand location field. Click the fields tab.
3. In the bottom most row under the field label, select "Name" from the drop down box. Add "DatePlacing" as well.
4. The DatePlacing field is a date field so select the right date format for your region from the drop down box.
5. Click Preview. You will see the fields have been added.
6. **Notice that when a function is selected all of the fields default to using the group function.
7. Now let's sort the data alphabetically by country.

8. Click on the "Fields" tab. Then click on the "sort a-z" checkbox on the same row as the "StandLocation" field.
9. Click the "Preview" tab. Now the data is sorted. Let's save the report.
10. Click on the "Save as" tool bar button, name your report, for example "Vacancies per Location", and enter the category you want the report to be shown under, for example "Training", click ok. Now you have a saved HROffice report.

Stand Location ▼	Name	Date Placing
sadada	Servicedesk Medewerker C2C	21-1-2013
IJmuiden	test twitter	2-10-2013
Heemstede	Servicedesk Medewerker B2C	15-2-2012
Heemstede	Financial Planner	11-4-2012
Heemstede	Account Manager binnendienst	13-4-2012
Haarlem	Senior Webanalist	15-2-2012
Haarlem	IT Specialist	15-2-2012
	Vacature met extra vragen	9-1-2014
	Vacature	16-1-2014

Screen shot from final report made in this example.

3.5.3 Visually Grouping & Subtotal Function

Goal - The goal of this example is to demonstrate the power of the Visually Grouping function and subtotal function using the report created in the previous example.

1. If you do not have the example open from before, then you will need to load it by clicking the link above.
2. Notice how some vacancies have multiple locations listed. We can visually group by the locations and have a cleaner report. Click on the "Fields" tab.
3. Click the "VG" check box in the "StandLocation" field row. Note: When using VG it must be the first field in the fields tab. If the field you select to Visually group by is not the first field then use the up arrow icons to make it the first field.
4. Click the "Preview" tab. Now the data is sorted by the StandLocation.
5. Click on the "Save as" tool bar button, name your report, for example " Vacancies per Location ", and enter the category you want the report to be shown under, for example "Training", click ok. The HROffice report is saved.

Haarlem

Vacancy name	Date Placing
IT Specialist	15-2-2012
Senior Webanalist	15-2-2012

Heemstede

Vacancy name	Date Placing
Account Manager binnendienst	13-4-2012
Financial Planner	11-4-2012
Servicedesk Medewerker B2C	15-2-2012

IJmuiden

Vacancy name	Date Placing
test twitter	2-10-2013

sadada

| Vacancy name	Date Placing
Servicedesk Medewerker C2C	21-1-2013

3.5.4 **Exporting a Report**

Goal: The goal of this example is to export the report created in the previous example to Excel using report designer. This can also be done in Report Viewer by selecting Excel from the "export type" drop down box and clicking the export button then follow step 3.

Note: To retain this information as it shows on your current HROffice Report let's export the information to Excel. Remember to capture the information showing on a current HROffice report you must download the report. Otherwise the report can change each time you open the report since it reads the data in real time from your data base.

1. If you do not have the example open from before, then you will need to load it by clicking the link above.
2. Click on the Excel button on the tool bar.
3. You will see a box that asks "Do you want to open or save this file".
4. Click "Open".
5. Now you will see a "web" version of the report.
6. Click file, save as.
7. Decide where you want to save the file and name the file.
8. Change the "Save as type" to Microsoft Excel Worksheet.
9. You now have an Excel document which shows the information from your report.

4.0 Data Sources Tab

The **Data Sources** tab shows you which Tables or Views you have access to from the database. The set of views is defined by the HROffice team.
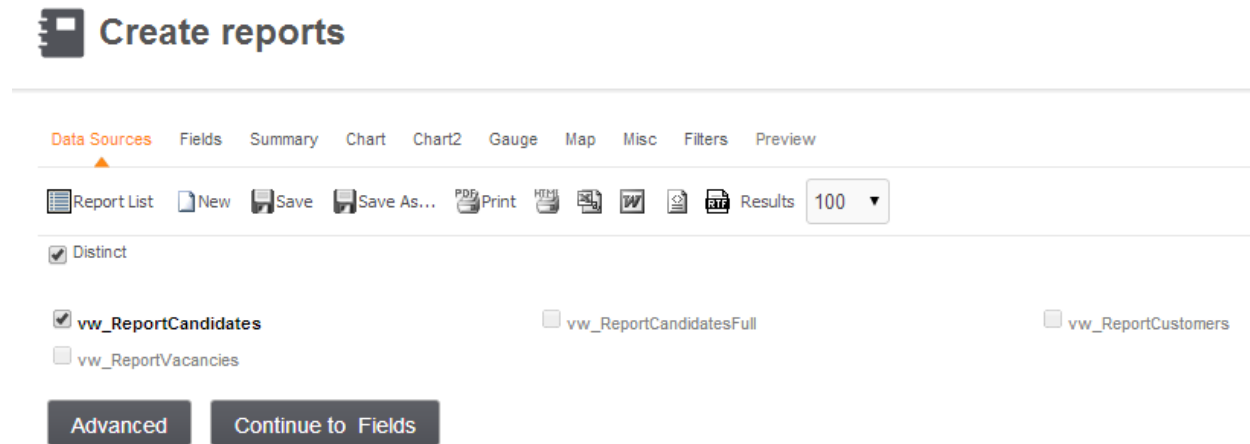

4.1 Simple Mode
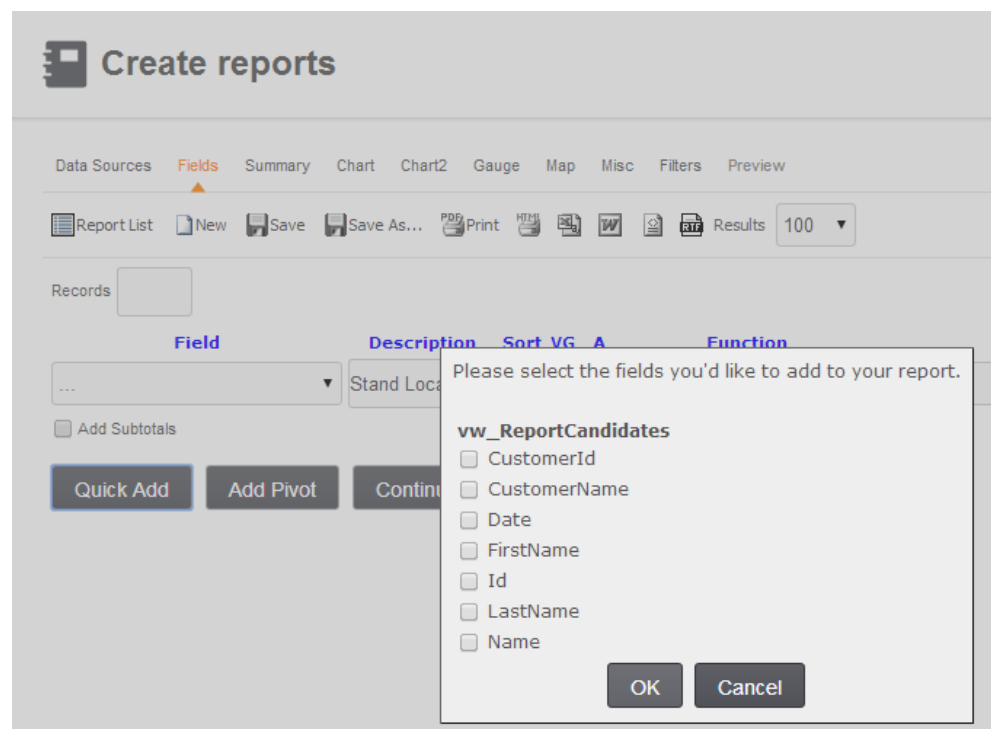
Data Source Selection

To join tables in check boxes mode you should just check the tables you want to join one after another. When you check the first table, all tables that cannot be joined to it will automatically be disabled. After you will select the next table to join, the list of available checkable tables will be refreshed

4.2 Advanced Mode

In Advanced Mode, you will have to select the relationships that exist between the tables or views yourself. You will start with a drop-down menu that lists the various Tables and Views that are available.
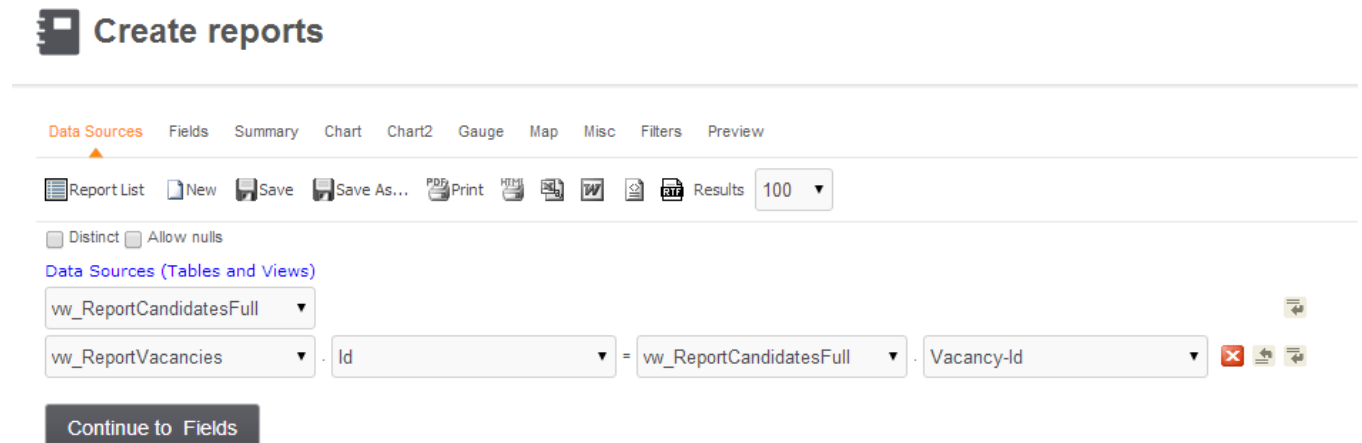
To join two tables and/or views, they must have fields with identical entries. For example, both the **_Candidates Full_** and the **_Vacancies_** tables have the same _VacancyID_ field that contains one of several possible entries: name, vacancyID's, location and so on. Foreign keys are not required to have the same name, but must possess a relationship that results in data when joined together.

The **Join Field** dropdown menu (below) is a list of the fields contained in the table/view selected in the **Table** dropdown menu to the left. Select the field that has identical entries as the table/view that it needs to be joined with.
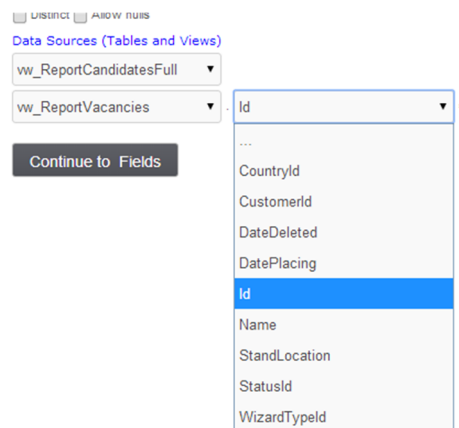
Join Field Dropdown Menu

The **Foreign Table** dropdown menu (below) is a list of the tables/views that have been selected in the **Table** dropdown menu, other than the one in that row. Select the table/view to join the table/view in that row.

Foreign Table Dropdown Menu

The **Field** dropdown menu (is a list of fields in the table/view that are selected in the **Foreign Table** dropdown menu to the left. Select the field to join with the table/view in that row.

Field Dropdown Menu

4.2.2 Understanding the Data Model

Most users choosing to use the Advanced Mode need to have a clear understanding of the database schema (image below), which is a blueprint of how the data is organized in the database, to be able to quickly join tables together. This mode does allow for greater flexibility in selecting the types of joins that can be performed, but is not recommended for most users.
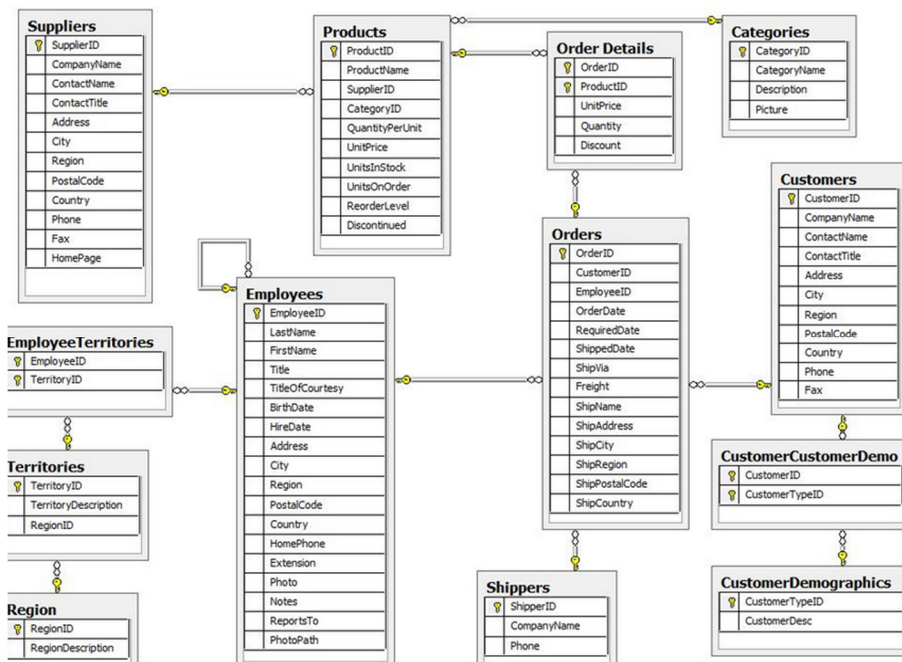
Example of database Schema Diagram

5.0 Fields Tab

Data Sources   Fields   Summary   Chart   Chart2   Gauge   Map   Misc   Filters   Preview

Report List   New   Save   Save As...   Print   W   Results   100 ▼

Records

Field	Description	Sort	VG	A	Function	Format
...		☐	☐	☐	...	...

...

vw_ReportCandidatesFull

Candidate-AvailablePer

Candidate-BIGNumber

Candidate-BirthDate

Candidate-City

Candidate-CountryId

Candidate-CountryName

Candidate-CustomFunctionId

Candidate-CustomFunctionName

Candidate-EducationLevelId

Candidate-EducationLevelName

Candidate Email

ontinue to Summary

Fields Tab

After selecting the data sources you want to display, as in the previous step, continue to the Fields tab. In the **Fields** tab, you will choose which fields you want to display and be able to apply various formatting options.   Listed below is a brief description of the properties available in the main Fields tab screen.

Feature	Description
Field Selection	Select fields from the drop-down menu or use the Quick Add button
Description	Displays a new title for the Field
Sort	Sorts A - Z
VG	Visually Groups the Field
A	Arithmetic – Performs basic calculations (+, -, x, %) and concatenation of text.
Function	Displays functions available based on the type of data being accessed.
Format	Displays the formats available to be displayed based on the data type.
Other buttons	On the far right you can delete, insert, move, or set advanced properties.
Records	Sets the number of records to display, which is used many times to add a Top to the query result, such as Top 10 Customers by Revenue
Add Sub-total	Adds a sub-total to the report under each numeric column
Add Side-total	Adds a side-total to the report beside each numeric row
Quick Add	Lets you quickly add multiple fields to the report at one time
Add Pivot	Displays the pivot inputs to add to the report
Continue to Summary	Continues to the next tab in the report design process, the Summary tab.

5.1 Field Dropdown Menu

The **Field** dropdown menu is a list of the available fields in the table/view that is selected in the **Data Sources** tab. If joining tables/view, the title of the table/view that the field is from appears in parenthesis next to the name of the field. Select the fields to display. The entries in the list that are in **Bold** are the table/datasource names.
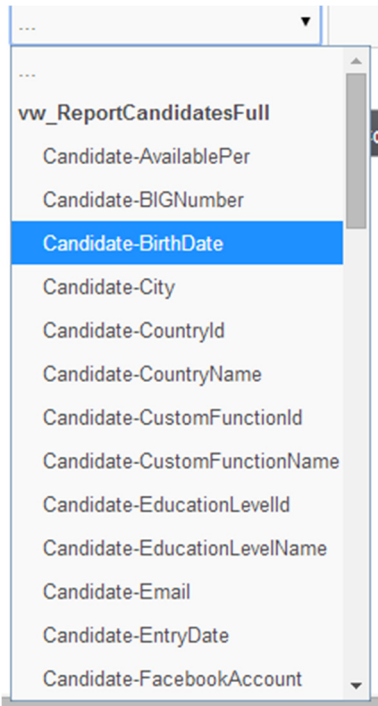
Field Dropdown Menu

5.2 Description

Automatically Inputs the name of the associated Field. You have the option to change the description and it will appear as the new title when displayed.

Description

5.3 Sort, VG, & Arithmetic Check Boxes

Sort, VG, & Arithmetic Check Boxes

Table 3 explains the **Sort, Group, and VG Check Box** features.

Features	Description
Sort check box	Check this box if you want the table/view to be sorted by the field selected in the **Field** dropdown menu to the left in ascending order.
Sort (z-a) under **Advanced**	**This check box is in the advanced properties of the row and can be set if you want the table/view to be sorted by the field selected in the Field dropdown menu to the left in descending order.**
VG check box	Check this box to change the column for the field selected in the **Field** dropdown menu to the left into subheadings
Arithmetic	Arithmetic. Performs basic calculations (+, -, x, %) and concatenation of text. Calculated Fields KB

Descriptions of Sort, Group, and VG Check Boxes

5.4 Other Buttons on the Fields Tab

The ![x], ![below] , **and** ![above] function buttons shown in Figure 5-1 are for the rows that they are in.

Figure 5-1 Function Buttons of Fields Tab

Table 4 describes the function buttons of the **Fields** tab.

Icons	Control Name	Description
![x]	Delete button	**Click this button to delete the row the button is on.**
![above]	Insert Row button (above)	Click this button to insert a row above the row the button is on.
![below]	Insert Row button (below)	Click this button to insert a row below the row the button is on.
![move]	Move	Allows user to move a row up or down in the list
![advanced]	Advanced Properties	Advanced properties for that row.

Table 4 Function Buttons of Fields Tab

5.5 Functions Drop-Down

Functions allow you to perform calculations on the data and can be chosen from the dropdown menu based on the data type of the selected Field.

 Link to external Article on SQL Functions (w3schools.com)

Text (String) Functions Available

Field	Description	Sort	VG	A	Function
ShipCountry(nvarchar)	Ship Country	☐	☐	☐	...
...		☐	☐	☐	

...
Count
Count Distinct
Maximum
Minimum
Group

☐ Add Subtotals   ☐ Add Side Total

Date/Time Functions Available

Field	Description	Sort	VG	A	Function
OrderDate(datetime)	Order Date	☐	☐	☐	...
...		☐	☐	☐	

...
Count
Count Distinct
Maximum
Minimum
Group(Day)
Group(Month)
Group(Year)
Group(Month Name)
Group(Day of Week)
Group(Date)
Group(Year & Month)
Group(Year & MN)
Group(Week)
Group(Year & Quarter)
Days Old
Average(Days Old)
Sum(Days Old)
Group

☐ Add Subtotals   ☐ Add Side Total

[Quick Add] [Add Pivot] [Continue to Summary] [Preview]

Numeric Functions Available

Field	Description	Sort	VG	A	Function
OrderID(int)	Order ID	☐	☐	☐	...
...		☐	☐	☐	

...
Average
Count
Count Distinct
Maximum
Minimum
Sum
Sum Distinct
Group

☐ Add Subtotals   ☐ Add Side Total

[Quick Add] [Add Pivot] [Continue to Summary] [Preview]

Functions Table

Function Name	Description
. . .	No function used
Average	Average the values in a column
Count	Counts the number of values in a column
Count Distinct	Counts the number of distinct values in a column
Maximum	Takes Maximum value of a field
Minimum	Takes Minimum value of a field
Sum	Sums the values in a column
Sum Distinct	Sums the rows with distinct values in a column.
Group	Groups field values together for aggregating
Group(Day)	23; day of month
Group(Month)	3; instead of March
Group(Year)	2012
Group(Month Name)	July
Group(Date)	7/4/2012
Group(Day of Week)	Sun or Mon
Group(Year & Month)	2012 -07
Group(Year & MN)	2012 - Jul
Group(Week)	Jul 01 – Jul 07 (Sunday to Saturday of Week)
Group(Year & Quarter)	2012–Q3
Days Old	342 (Number of Days from Today's Date)
Sum(Days Old)	782 (Sums the Number of Days from Todays Date)

5.6 Format Dropdown Menu

The **Format** dropdown menu is a list of formats for the entries of the field selected in the **Field** dropdown menu directly to the left to appear in. Depending on the Field data type and the function, you will have differing options for formatting. The main two formats used will be available for all numbers and dates.

Format Dropdown Menu

Numeric Formats Available
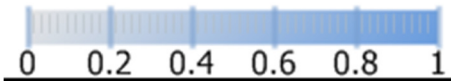
Format	Description	Examples
. . .	Displays the number as it is stored in the database	500
0,000	Displays as a whole number	500
0,000.00	Displays with two decimal places	500.00
$0.00	Displays as currency with two decimal places	$500.00
$/100	Displays the Number / 100 In currency format.	$5.00
0.0	Displays with one decimal place	500.0
0.00	Displays with two decimal places	500.00
0.000	Displays with three decimal places	500.000
0%	Displays the number as a percentage	50000%

% of Group (with rounding)	Same as % of Group but rounds to closest tenth (ex. 1.11547% would be 1.1%).	100.0% (only one selected value, 500)
% of Group	Calculates the percentage of the row value to the entire group of values.	100%
Gauge	Shows value in a Linear Gauge instead of a numerical value.	0 0.2 0.4 0.6 0.8 1
Gauge (variable)	Shows values in a Linear Gauge which changes format due to values.	
Dash Gauge	Shows values in a Linear Gauge which changes format due to values.	

Date/Time Formats Available

Format	Description	Examples
. . .	Displays the date as it exists in the database	7/4/2012 12:00:00 AM
Short Date	Displays date using the mm/dd/yyyy format	7/4/2012
Long Date	Displays the day of the week, month, numeric day, and the year	Wednesday, July 04, 2012
Short Time	Displays time as hh:mm AM/PM	12:00 AM
Long Time	Displays time as hh:mm:ss AM/PM	12:00:00 AM
Full(short)	Displays the **Long Date** format, followed by the **Short Time** format	Wednesday, July 04, 2012 4:34 PM

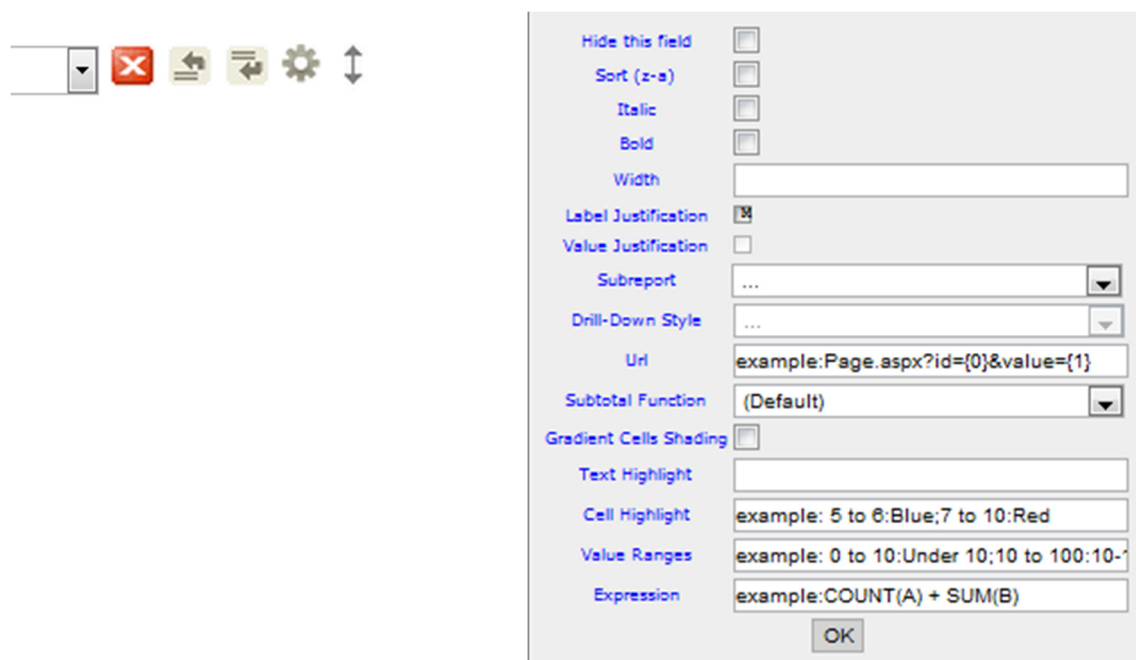| Full(long) | Displays the **Long Date** format, followed by the **Long Time** format | Wednesday, July 04, 2012 4:34:52 PM |
| D&T (short) | Displays the **Short Date** format, followed by the **Short Time** format | 7/4/2012 4:34 PM |
| D&T (long) | Displays the **Short Date** format, followed by the **Long Time** format | 7/4/2012 4:34:52 PM |

Date Format Dropdown Table

5.7 Quick Add

Quick Add lets you add multiple fields to the report at one time by selecting from a list.

5.8 Advanced Field Settings Button

To access the Advanced Field Settings, click on the Gear icon on the selected Field.

Setting Name	Description
Hide this field	Hides the field from display when report is ran
Sort (z-a)	Sorts in descending order
Italic – Bold	Italic and Bold for that field
Width	Set the width of the column in number of pixels
Label Justication	Sets the Column label to the left, right, or middle of the row
Value Justication	Sets the Value of the field to the left, right, or middle of the row
Subreport	Sets the drill-down child report

Drill-Down Style	**Link** – opens in same browser window **Link (New Window)** – opens in new browser window **Embedded** – embeds the drill-down results into the main report **Popup** – opens the results on a pop-up screen

SubTotal (Function)	
Gradient Cells Shading	Sets a gradient effect shading the affected cells. Canada | Ship City	Total
Montréal	$1,394.22
Tsawassen	$793.95
Vancouver	$9.92
	$2,198.09	
Text Highlight	Highlights the text for the given range. Can use any color from list on Styles Tab color drop-down. Example: 5 to 6:Blue;7 to 10:Red
Cell Highlight	Highlights the cell for the given range.

Value Ranges	Let's you set text values for number ranges, so if you set 0 to 10: Under, Vancouver would say Under from above
	<table><tr><td>Vancouver</td><td>Under</td></tr><tr><td></td><td>**$2,198.09**</td></tr></table>
Expression	Below, we use Sum (Freight) * .35 to get the new column
	Argentina
	<table><tr><td>**Number of Orders**</td><td>**Freight Amount**</td><td>**Freight * 35%**</td></tr><tr><td>16</td><td>$598.58</td><td>$209.50</td></tr></table>

5.9 Add Pivot

Add Pivot lets you generate analytical data grids and essentially adds extra pivot columns to the right side of the report.

Records

Field   Description   Sort VG A Function   Format
...   ☐   ☐ ☐ ...   ...

Add pivot columns for   OrderDate   using   Group(Year)   function
Calculate cell values on   Freight   field with   Sum   function and $0.00   format.
☐ Add Subtotals   ☐ A

```
...
CustomerID
EmployeeID
Freight
OrderDate
OrderID
RequiredDate
ShipAddress
ShipCity
ShipCountry
ShipName
ShippedDate
ShipPostalCode
ShipRegion
ShipVia
```

Quick Add   Remove pi   Preview

6.0 Filters Tab

In the **Filters** tab (**Error! Reference source not found.**), the fields of the table/view chosen in the **Data Sources** tab can be filtered so that only pertinent entries appear in the table.
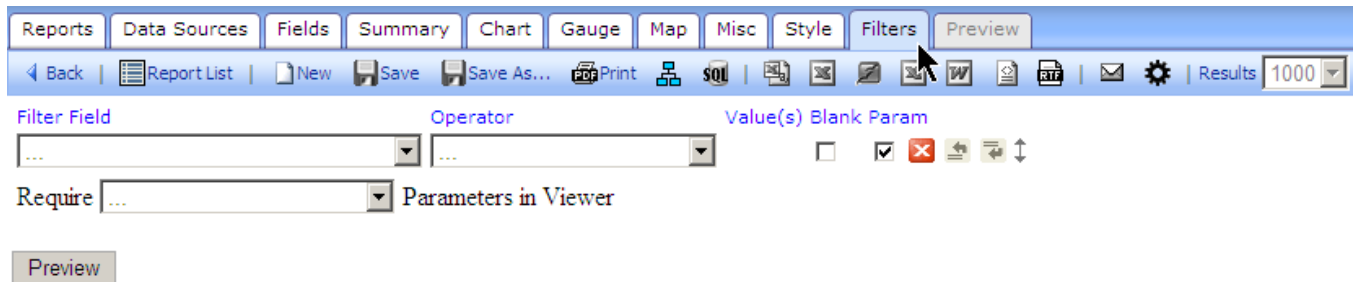
6.1.1 Filter Field Dropdown Menu

The Filter Field dropdown menu is a list of the available fields in the table/view that have been selected or created in the **Data Sources** tab. Select the fields to filter. If joining tables/view, the title of the table/view that the field is from appears in parentheses next to the name of the field.
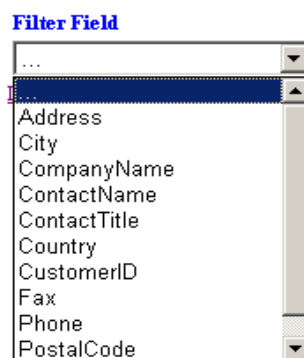
Figure 6-1 Field Dropdown Menu

6.1.2 **Filter Operator Dropdown Menu and Value(s)**

Operator Dropdown Menu and Value(s).

The Filter Operator Drop-down lets you select your operator based on the data type that has been selected in the filter. the filter fields available are only those under the Tables or Views selected in the Data Sources tab.

Data Type	Categories Available
Number	Comparison, Equivalence, Field Comparison
Text	All of the above and Text
Date/Time	All of the above and Date/Time

6.1.3 **Operator Categories**
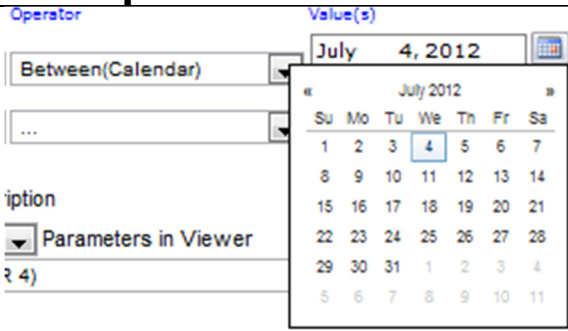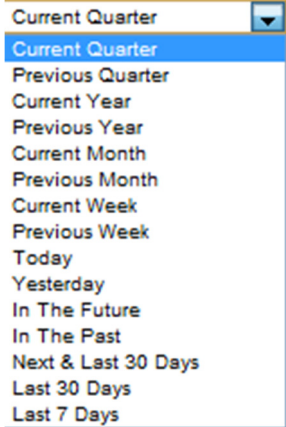
Comparison
Is Less Than
Is Greater Than
Between
Isn't Less Than
Isn't Greater Than
Isn't Between

Equivalence	Description
Equals	Enter the value(s) directly.
Equals (List)	Allows you to copy/paste a list of values from a .csv file
Equals (Autocomplete)	 Start typing the value and it will autocomplete for you
Equals (Select)	Select a single value from a drop-down list for a particular field
Equals (Multiple)	Select multiple values from the drop-down list
Equals (Popup)	Select the values from a pop-up menu
Doesn't Equals	
Doesn't Equals (Select)	
Doesn't Equals (Multiple)	
Doesn't Equals (Popup)	

Field Comparison	Description
Is Less Than (Field)	
Is Greater Than (Field)	
Equals (Field)	**Multiple Field Joins – when needing to join on multiple fields or keys**
Not Equals (Field)	

Available for All	
. . .	No filter is set for the report.
Blank	Records that include blank or Null values will be included in the report.
Isn't Blank	Records that do not include blank or Null values will be included in the report.
Use Previous OR	**How to Use Previous OR KB**

Text	Description
Like	You can use the Like operator to find values in a field that match the pattern you specify. Like "sa" could return sam, samurai,or raisan.
Begins With	Begins with the values you set.
Ends With	Ends with the values you set.
Isn't Like	Isn't Like "sa" would not return any results with sa in it.

Date/Time	Description
Between (Calendar)	Between two dates you select from a calendar
In Time Period	You can use the standard values above or create your own custom timespans. **Add New Time Period KB**
Less Than Days Old	
Greater Than Days Old	
Equals Days Old	

6.1.4 **Blank and Param Checkboxes**

Filter Selection

The Blank and Param checkboxes (see image above) allow you to control the filtering behavior in the report viewer. ***They do not affect the "Preview" tab of the report designer.***

Blank Checkbox: To use this, first set a "Filter Field" and then set an "Operator."

If "Blank" is checked, the filter will return data which matches the "Value(s)" dropdown/textbox and also data which has a blank/null value in that field .

In the example above, if "Blank" is checked and then viewed in the report viewer, then the user would see all of the data where the "ShipCity" begins with "s" and all of the "Address" records which are blank or null.

Param Checkbox: To use this, first set a "Filter Field", set an "Operator", and then set "Value(s)", as in the previous example. This will display the filtered report in the report viewer and allow the user to change the filter value. If it is not checked, then the filter will not be visible to the end-user and the end-user will not be able to change the filter.

The example above shows a filter which will display a report in the report viewer where only the Address fields which begin with "s" will be shown. However, a user will be able to change the "s" to a "t" and update the report if desired.

6.1.5 **Other Buttons on the Filters Tab**

The ☒, ⮌ , ⮌ , ⚙ and ↕ function buttons of the **Filters** tab are shown below.

Icons	Control Name	Description
☒	Delete button	**Click this button to delete the row the button is on.**

	Insert Row button (above)	Click this button to insert a row above the row the button is on.
	Insert Row button (below)	Click this button to insert a row below the row the button is on.
	Move	Allows users to move a row up or down in the list.

Table 7 Descriptions of Buttons

6.1.6 Other Filter Features

Feature	Description
Show Filters in Report Description	Lists the Filters on the screen when accessed in the Report Viewer
Require ___ Parameters in Viewer	Sets the number of filter parameters the user must set when accessing this report in the Report Viewer
Filter Logic (Conditional Filtering)	Ex: (1 OR 2) AND (3 OR 4) HROffice reporting allow you to have an arbitrary number of filters on a new report. These filters can even be applied with custom logic which you define. The text box in the Filters Tab labeled "Filter Logic" is where you configure this logic. Once you change its text this setting goes into effect. The example, "(1 OR 2) AND (3 OR 4)" is applied using parenthesis to guide the order of operations. Results will be filtered conditionally based on meeting either Filter 1 or Filter 2 in addition to meeting either Filter 3 or Filter 4. More simple and more complex advanced logic filters can be constructed. If you have a mere 2 filters a simple "1 OR 2" will force your results to be meet one or the other of your filters. Alternatively you can nest parenthesis and combine logical operators to form sophisticated advanced filters

Require ____ Parameters in Viewer

The example below requires the user to select at least two parameters before the report will run in the Report Viewer.

3	ShipCountry	▼	Equals (Select)	▼	UK	
4	...	▼	...	▼		

☐ Show Filters In Report Description

Require [... ▼] Parameters in Viewer

Filter Lo[
...
All
At Least One
The First
The First Two
]

ShipCountry	▼	Equals (Multiple)	▼

```
...
Argentina
Austria
Belgium
Brazil
```

ShipCity	▼	Equals (Multiple)	▼

```
...
Buenos Aires
```

...	▼	...	▼

Please select the first two filters

Require The First Two Parameters in Viewer

7.0 Summary Tab

In the **Summary** tab (below), a table can be created that summarizes the chosen fields using different functions (Ex: *Average*, *Count*, *Maximum*, and so on). You can also make a group of fields by choosing the **Group** option from the **Function** dropdown menu.

Most actions and properties available in the Summary Tab are available in the Fields Tab.

The only difference is the removal of the Quick Add and Pivot capabilities, and addition of the Add Deltas checkbox

For more information on performing a Summary, refer to the Fields section.

Summary Tab

Ship Country	Sum(Freight) ▼
USA	$13,771.29
Germany	$11,283.28
Austria	$7,391.50
Brazil	$4,880.19
France	$4,237.84
Sweden	$3,237.60
UK	$2,954.27
Ireland	$2,755.24
Venezuela	$2,735.18
Canada	$2,198.09
Denmark	$1,396.19
Switzerland	$1,368.53

Summary Results

7.1 Deltas

Delta means "Change In".
Any time there is a change in a quantity that change is calculated by taking the later value for that quantity and subtracting from it the earlier value for that quantity.

This can be used in a report by selecting "Add Deltas" under the Summary tab.
Select the "Add Deltas" checkbox under Summary tab.

Reports	Data Sources	Fields	Filters	Summary	Chart	Gauge	Misc	Style	Preview

Report List | New | Save | Save As... | Print | SQL | | | | | | | Preview Results 1000

Show 10 records

Field	Description	Sort(a-z)	Sort(z-a)	VG	A	Function	Format
CustomerName	Group(Customer Na	☑	☐	☐	☐	Group	...
OrderDate	Group(Year & MN)(	☐	☐	☐	☐	Group(Year & MN)	Short Date
UnitPrice	Sum(Unit Price)	☐	☐	☐	☐	Sum	$0.00
...		☐	☐	☐	☐	...	...

Add subtotals using (none) function.

Continue to Filters   Preview

Report view showing Summary with Delta.

Group(Customer Name)	Group(Year & MN)(Order Date)	Sum(Unit Price)
Alfreds Futterkiste	2007 - August	
		($7.4
Alfreds Futterkiste	2007 - October	
		($7.8
Alfreds Futterkiste	2008 - January	
		$9
Alfreds Futterkiste	2008 - March	
		($71.70
Alfreds Futterkiste	2008 - April	
		$12.
Ana Trujillo Emparedados y helados	2006 - September	
		$60.
Ana Trujillo Emparedados y helados	2007 - August	
		($78.50
Ana Trujillo Emparedados y helados	2007 - November	
		$78.0
Ana Trujillo Emparedados y helados	2008 - March	
		($108.40
Antonio Moreno Taquería	2006 - November	

Group(Customer Name) ▼	Group(Year & MN)(Order Date)	Sum(Unit Price)
Alfreds Futterkiste	2007 - August	
Alfreds Futterkiste	2007 - October	
Alfreds Futterkiste	2008 - January	
Alfreds Futterkiste	2008 - March	
Alfreds Futterkiste	2008 - April	
Ana Trujillo Emparedados y helados	2006 - September	
Ana Trujillo Emparedados y helados	2007 - August	
Ana Trujillo Emparedados y helados	2007 - November	
Ana Trujillo Emparedados y helados	2008 - March	
Antonio Moreno Taquería	2006 - November	

Result: The Deltas() show the change in the Unit Price over the period of time.

8.0 Chart Tab

In the **Chart** tab, a chart can be created using the data in the table/view selected on the **Data Sources** tab**.**
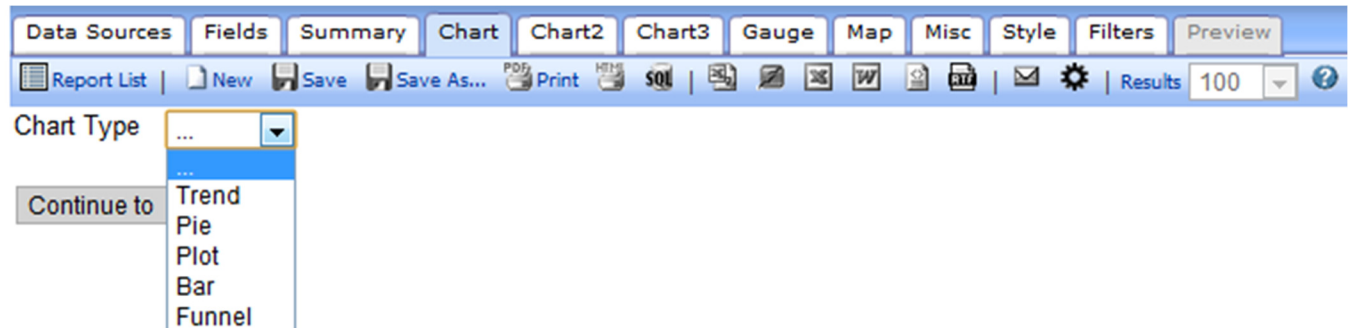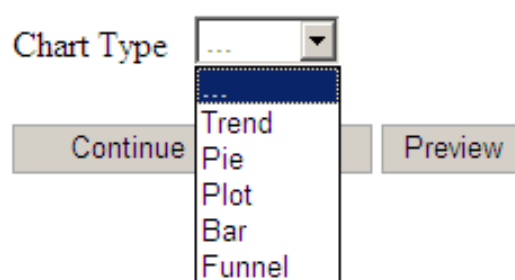

Chart Tab

The Charts Tab lets you create different variations of charts, including:

Trend, Pie, Plot, Bar, Funnel

You can have multiple charts in one report or put multiple charts of summary information on a Dashboard to show key business metrics.

8.1.1 **None Selection**

When the chart type is **None (…),** no chart appears.

None Selection

8.2 Trend Selection
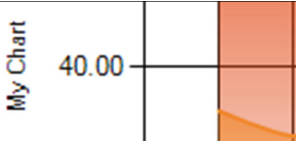

Trend Selection

The table below describes the features of the **Trend** chart type selection.

Features	Description
Trend chart	By choosing chart type **Trend**, the chart appears in **Trend** format.
Date dropdown menu	**Will show all of your available fields that are dates**
Value dropdown menu	Choose any value from the dropdown list.
Show Legend	
Show Value Labels	
Smooth	Smoothing of the data points, as seen in graph Figure x-x above
Label Title (Bottom)	

|	Inserts a label centered at the bottom of the chart
Value Title (Left)	My Chart 40.00 Inserts a label centered to the left of the chart
Scale %	Allows you to scale your chart to a percentage of the original size

8.2.1 Example of Trend Chart showing Vacancies by Month

8.2.2 **Example of an Advanced Trend Chart Report**

In this example, we will modify the trend chart created in 8.2.1 above, by separating the data by year and smoothing out the graph.
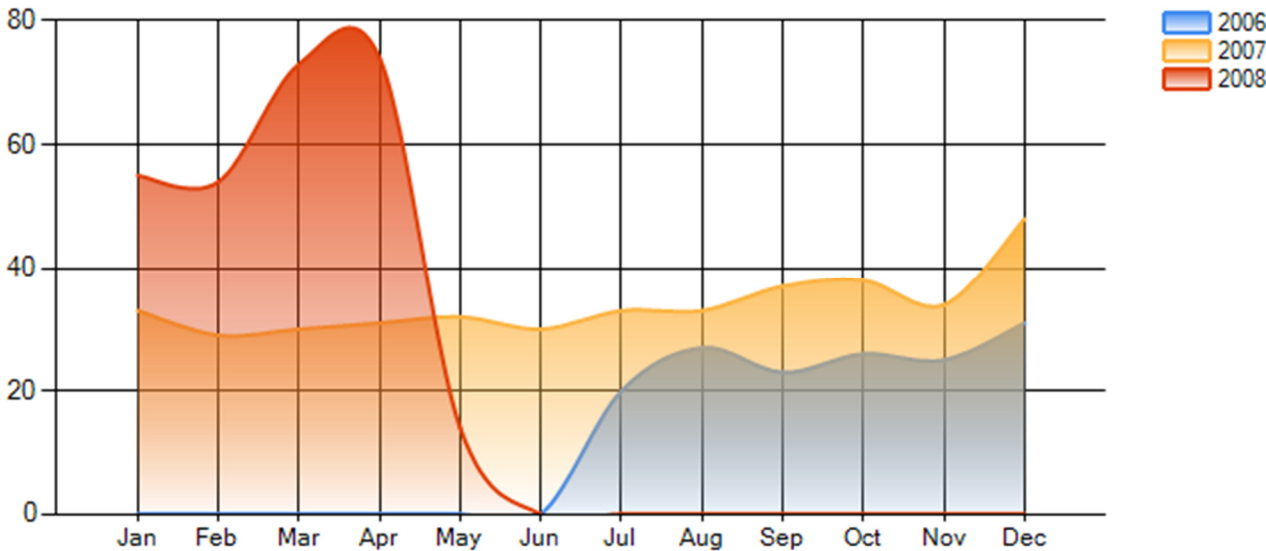
8.3 Pie Chart

The images below show the **Pie** (chart) selection menu of the **Chart** tab.

Pie (Chart) Selection

The table below describes the **Pie** chart selection.

Features	Description

Pie chart	By choosing chart type **Pie**, the chart appears in **Pie** format.
Label dropdown menu	**Choose any label from the dropdown list.**
Value dropdown menu	Choose any value from the dropdown list.

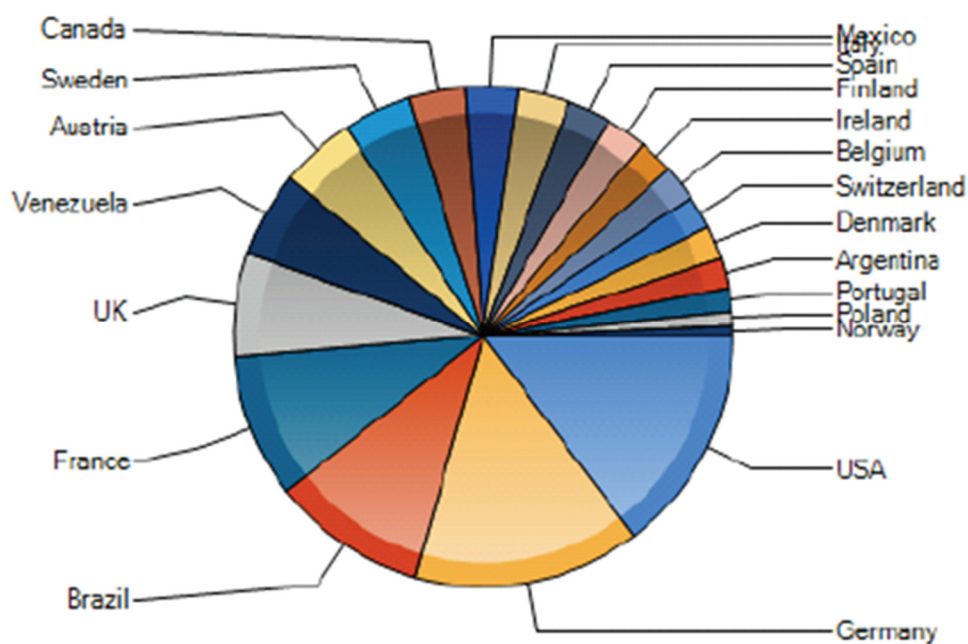**Description of Pie (Chart) Selection**

8.3.1 Example of a Pie Chart showing the percentage of Vacancies from each country

8.3.2 Creating an Advanced Pie Chart Report

In this example, we will modify the pie chart created in the pie chart above in Figure x-x by separating the data by year so we can see which countries had the most orders each year.

Chart Type [Pie ▼]

Title [Orders by Country and Year] Records [10]

Label   [ShipCountry ▼] Function [Group ▼] Sort ☐ Sort (z-a) ☐

Value   [OrderID ▼] Function [Count Distinct ▼] Sort ☑ Sort (z-a) ☐

Separator [OrderDate ▼] Function [Group(Year) ▼]

Show Legend   ☑
Show As 3D   ☐
Explode largest slice   ☑
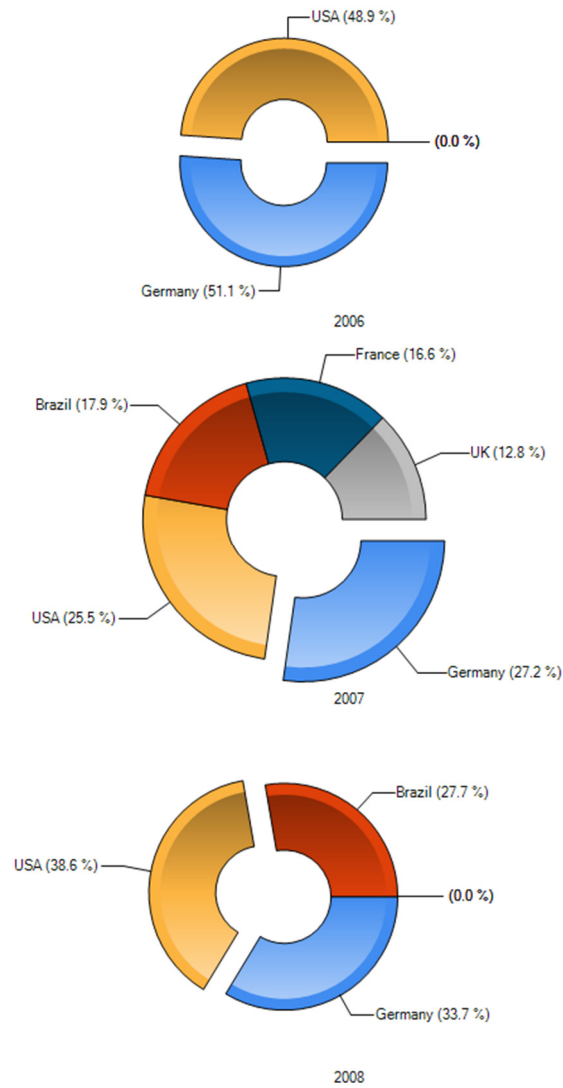Show Percentage   ☑
Show Value Labels   ☐
Show Slice Labels   ☑
Combine Bottom % [0]

Chart Type   [Doughnut ▼]

Scale %   [   ]

Target report [... ▼]

2006

2007

2008

8.3.3 **Plot Selection**

The images below show the **Plot** (chart) selection of the **Chart** tab.

Chart Type [Plot ▼]

Title [   ] Records [   ]

X [OrderDate ▼] Function [Group(Year & MN) ▼] Sort ☑ Sort (z-a) ☐
Y [OrderID ▼] Function [Count Distinct ▼]
Separator [... ▼] Function [... ▼]

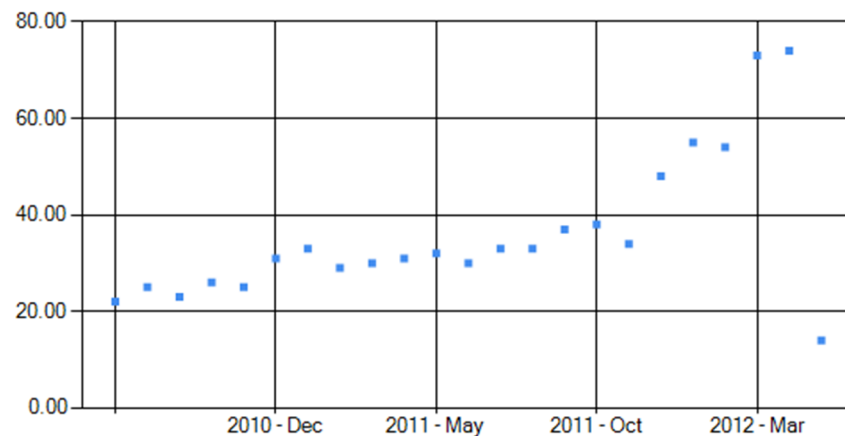Show Legend ☑
Connect ☐
Auto-Scale ☑
Scale % [   ]

[Advanced Properties]

[Continue to Chart2] [Preview]

Plot Selection

The table below describes the **Plot** (chart) selection.

Features	Description
Plot chart	By choosing chart type **Plot**, the chart appears in **Plot** format.
X-axis dropdown menu	**Choose any field from the dropdown for the X-axis.**
Y-axis dropdown menu	Choose any field from the dropdown for the Y-axis.

Description of Plot (Chart) Selection

8.4 Bar Charts

The images bellow show the user selection parameters for a simple Bar Chart which counts the number of distinct orders by country.
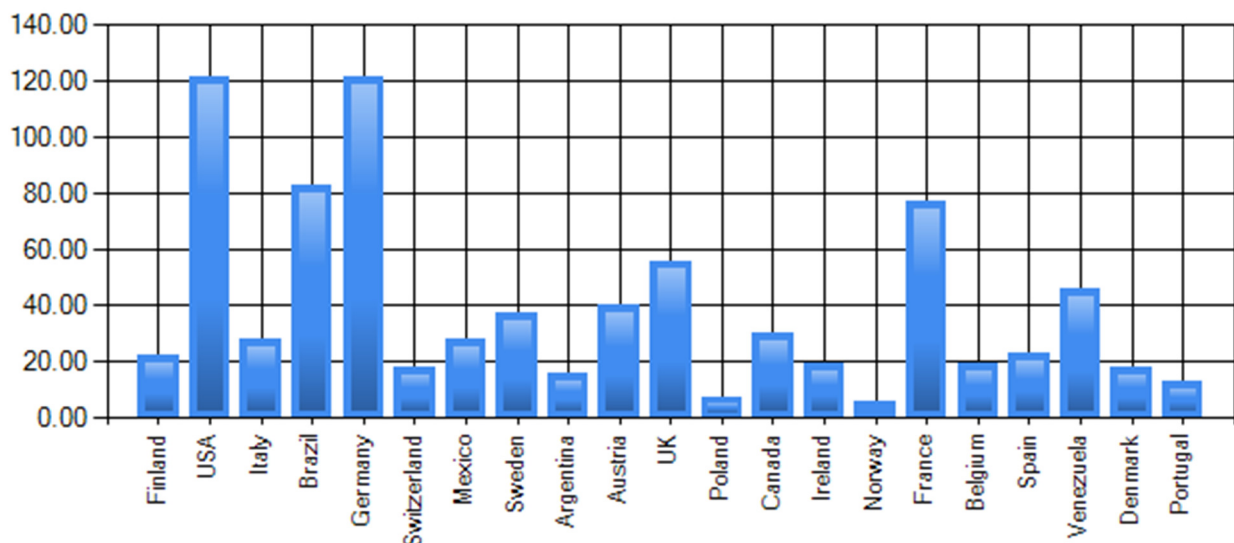
Chart Type   Bar ▼

Title [   ]   Records [   ]

Label ShipCountry ▼ Function Group ▼ Sort ☐
Value OrderID ▼   Function Count Distinct ▼ Sort ☐

[Advanced Properties]

[Continue to Chart2] [Preview]

The table below describes the **Bar** (chart) selection entries.

Features	Description
Bar chart	**By choosing chart type Bar, the chart appears in Bar format.**
Label dropdown menu	Choose any label from the dropdown list.

Value dropdown menu	Choose any value from the dropdown list.

Description of Bar (Chart) Selection

8.4.1 Example Bar Chart

Orders by Country by Year
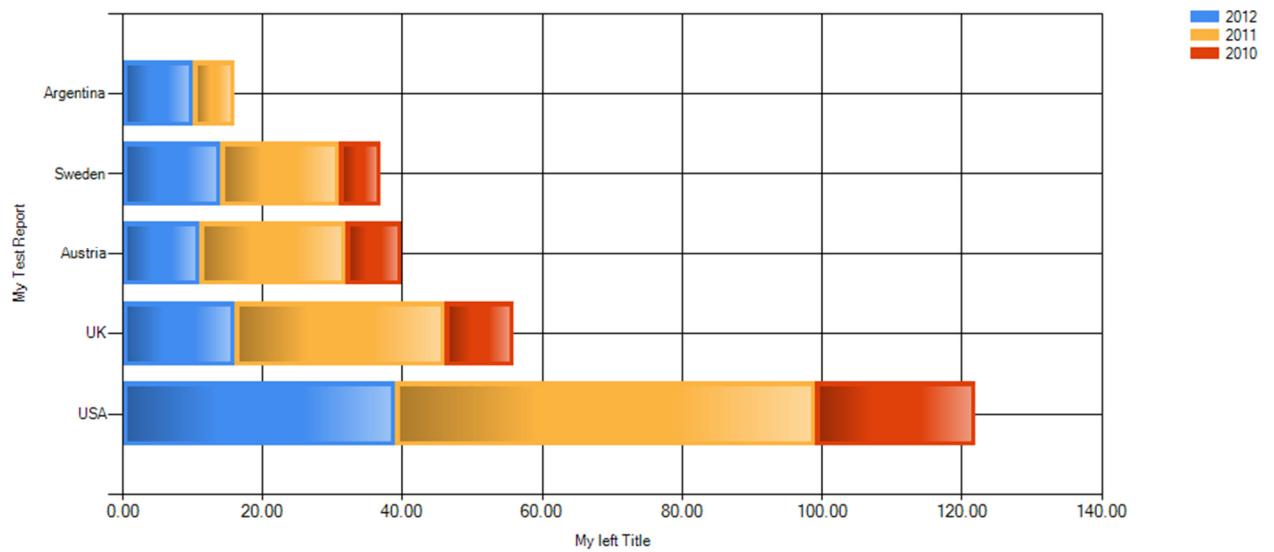
8.5 Example of Funnel Chart

The images below show the **Funnel** chart selection of the **Chart** tab.

9.0 Example of Gauge Tab
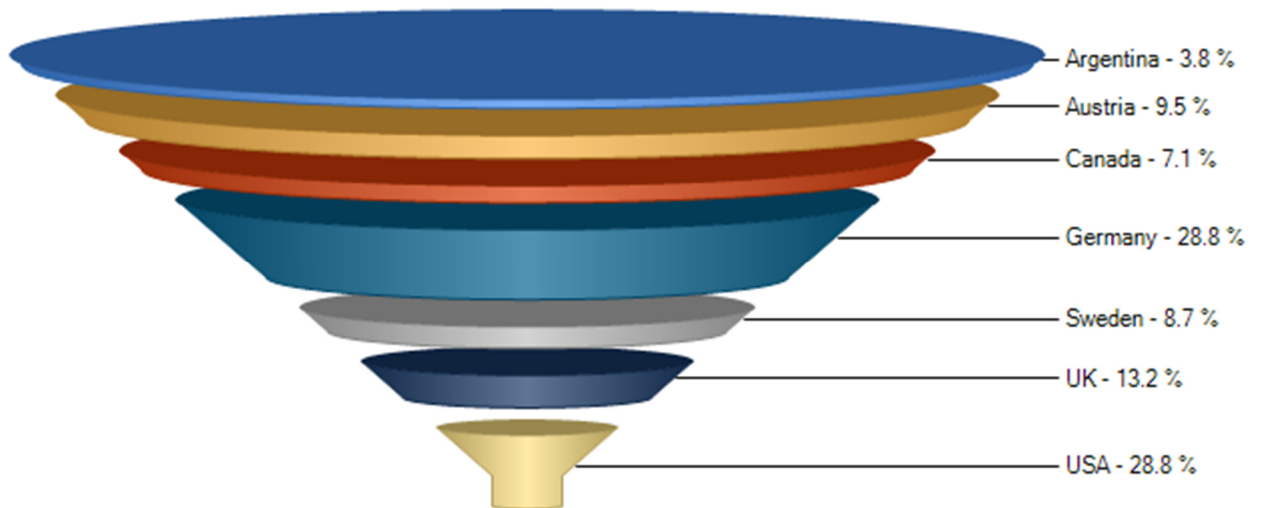
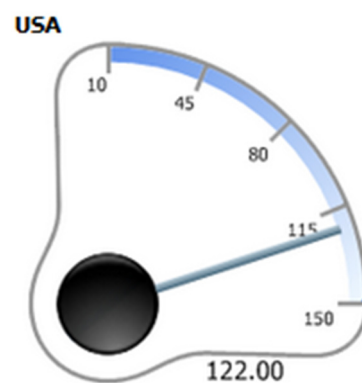In the Gauge tab, you can add a panel of gauges to a report.

There are four different types of gauges you can create:

Radial
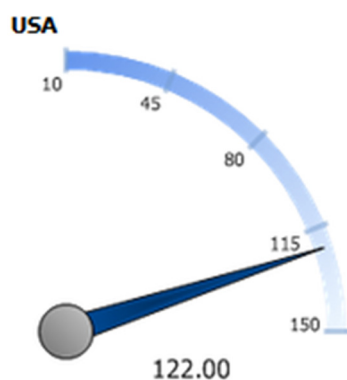
Radial 2

Animated Half Circle
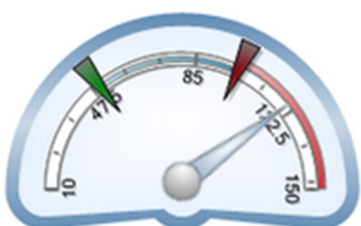
USA

122

USA

122

Linear

USA

10   38   66   94   122   150

9.1 Example of creating Four Gauges

The Report below is showing the first 4 gauges based on the alphabetical order of the selected countries.

Gauge tab contents
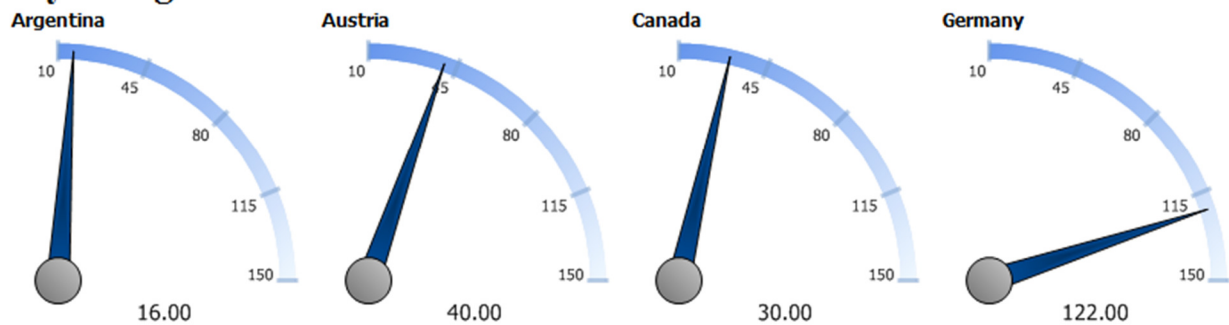
9.2 Example of creating the Top 4 Orders by Country Gauges

In the following example, you will see the gauges of the four countries with the greatest number of orders.

You can add four different types of gauges

Title	My Gauge		Results	4 ▼

Name ShipCountry ▼

Value OrderID ▼ Function Count Distinct ▼

Sort OrderID ▼ Function Count Distinct ▼ Sort (z-a) ☑

Minimum 10 Maximum 150

Color 0%:CornflowerBlue;100%:AliceBlue

Gauge Style ⦿ Radial ○ Radial 2 ○ Animated Half Circle ○ Linear

My Gauge

Germany	USA	UK	Austria
10	10	10	10
45	45	45	5
80	80	80	80
115	115	115	115
150	150	150	150
122.00	122.00	56.00	40.00
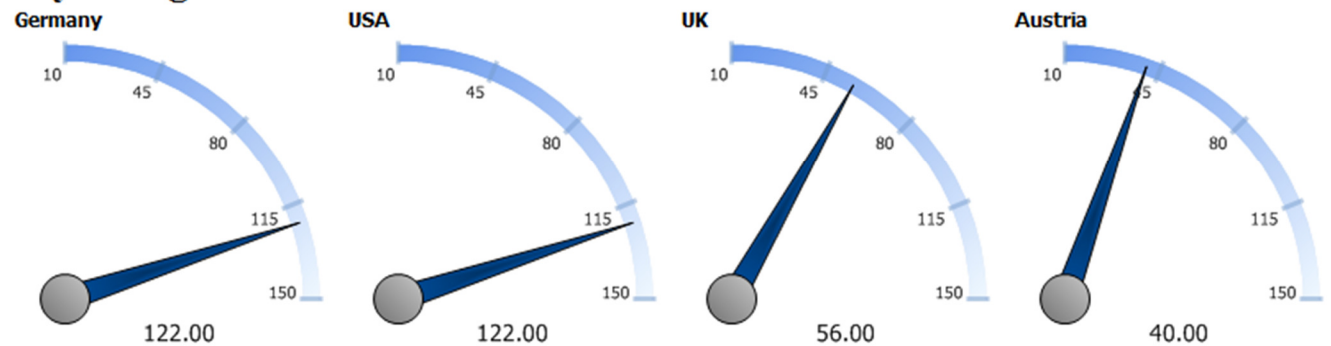
9.3 Changing Color Ranges

To change color ranges for the gauge, enter in a percentage range for each color, or enter a range of specific values.

Color `0% to 50%: Green; 50% to 100%: Red`
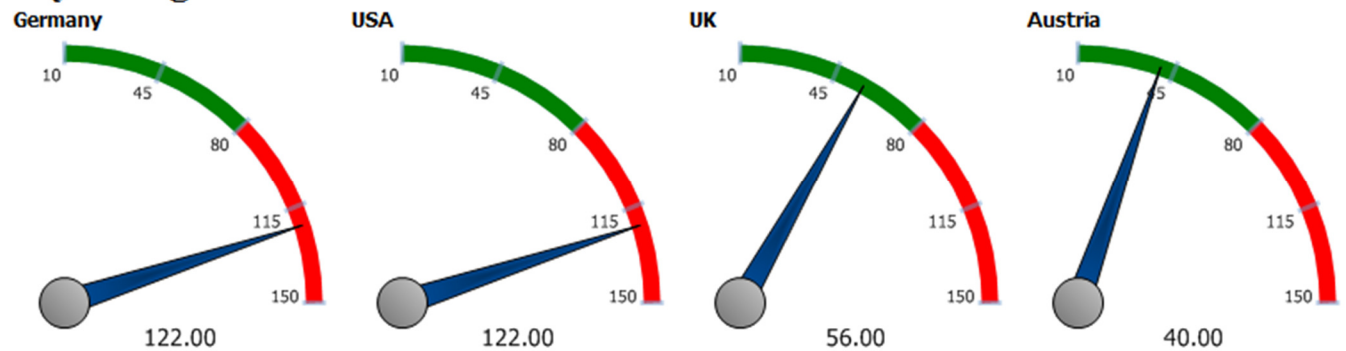
Gauge Style ● Radial ○ Radial 2 ○ Animated Half Circle ○ Linear

My Gauge

Germany — 122.00
USA — 122.00
UK — 56.00
Austria — 40.00

OR

Color `50%: green; 100%: red`

Gauge Style ● Radial ○ Radial 2 ○ Animated Half Circle ○ Linear

Finland — 22.00
USA — 122.00
Italy — 28.00
Brazil — 83.00

OR

Color   0 to 50: Red; 50 to 100: Yellow; 100 to 150: Green

Gauge Style ⦿ Radial ○ Radial 2 ○ Animated Half Circle ○ Linear

My Gauge

Germany

10 45 80 115 150
122.00

USA

10 45 80 115 150
122.00

UK

10 45 80 115 150
56.00

Austria

10 45 80 115 150
40.00
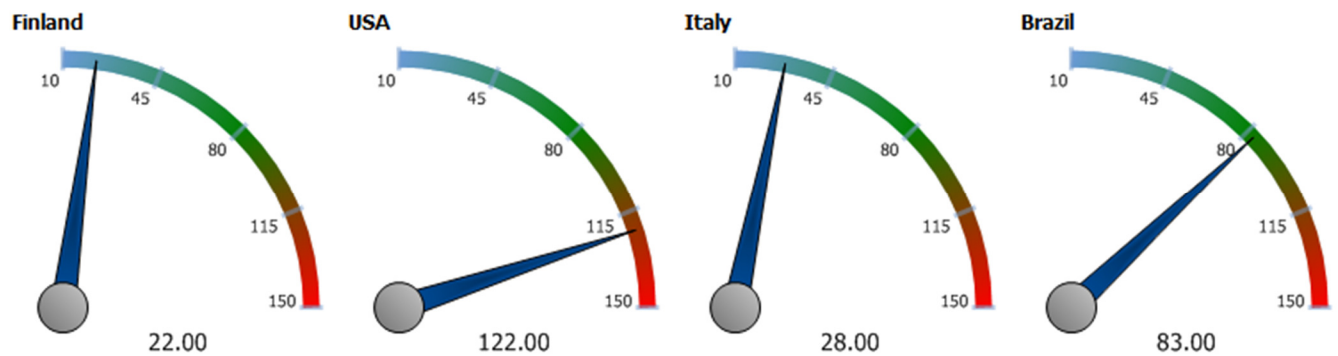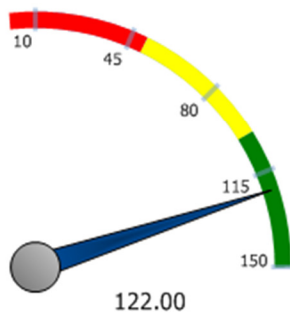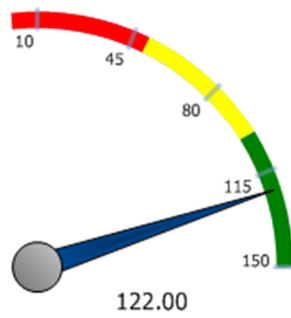
9.3.1 KPI's and auto-updating data with Animated Gauges

The Animated Half Circle opens up a few more options under the Gauge Style row.

With these new options, you can select the KPI Low and High, and select whether the Red values will be hidden, on the low side, or on the high side. You can also select how update the date updates.

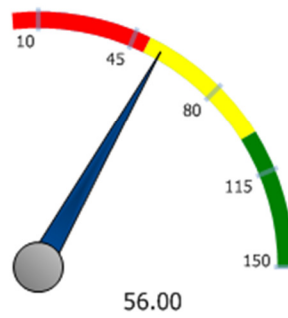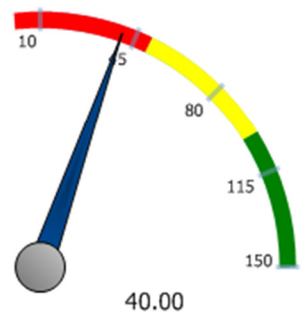|		
Title	My Gauge	Results 4 ▼
Name	ShipCountry ▼	
Value	OrderID ▼	Function Count Distinct ▼
Sort	OrderID ▼	Function Count Distinct ▼ Sort (z-a) ☑
Minimum	10	Maximum 150
Color	0 to 50: Red; 50 to 100: Yellow; 100 to 150: Green	
Gauge Style	○ Radial ○ Radial 2 ◉ Animated Half Circle ○ Linear	
KPI Low	75	
KPI High	125	
Update	3	sec
Red Values	○ Hide ◉ Low ○ High	

Target report ... ▼

[Continue to Misc] [Preview]

My Gauge

Germany   **USA**   **UK**   **Austria**
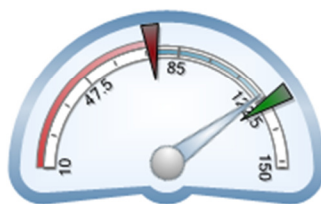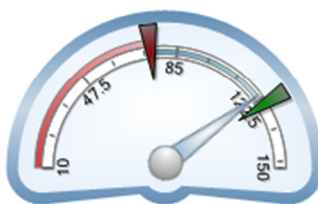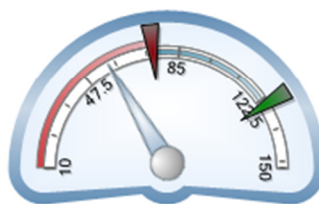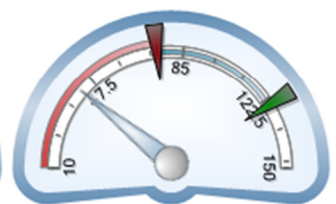
122   122   56   40

9.4 Gauges with Drill-Down Effects

Argentina

122.00

16.00

28.00

Cactus Comidas para llevar

City	Country	Phone	Amount
Buenos Aires	Argentina	(1) 135-5555	$0.33
Buenos Aires	Argentina	(1) 135-5555	$1.10
Buenos Aires	Argentina	(1) 135-5555	$2.84
Buenos Aires	Argentina	(1) 135-5555	$17.22
Buenos Aires	Argentina	(1) 135-5555	$19.76
Buenos Aires	Argentina	(1) 135-5555	$31.51
			$72.76

Océano Atlántico Ltda.

City	Country	Phone	Amount
Buenos Aires	Argentina	(1) 135-5333	$1.27
Buenos Aires	Argentina	(1) 135-5333	$8.12
Buenos Aires	Argentina	(1) 135-5333	$29.83
Buenos Aires	Argentina	(1) 135-5333	$49.56
Buenos Aires	Argentina	(1) 135-5333	$217.86
			$306.64

Rancho grande

City	Country	Phone	Amount
Buenos Aires	Argentina	(1) 123-5555	$3.17
Buenos Aires	Argentina	(1) 123-5555	$22.57
Buenos Aires	Argentina	(1) 123-5555	$38.82
Buenos Aires	Argentina	(1) 123-5555	$63.77
Buenos Aires	Argentina	(1) 123-5555	$90.85
			$219.18

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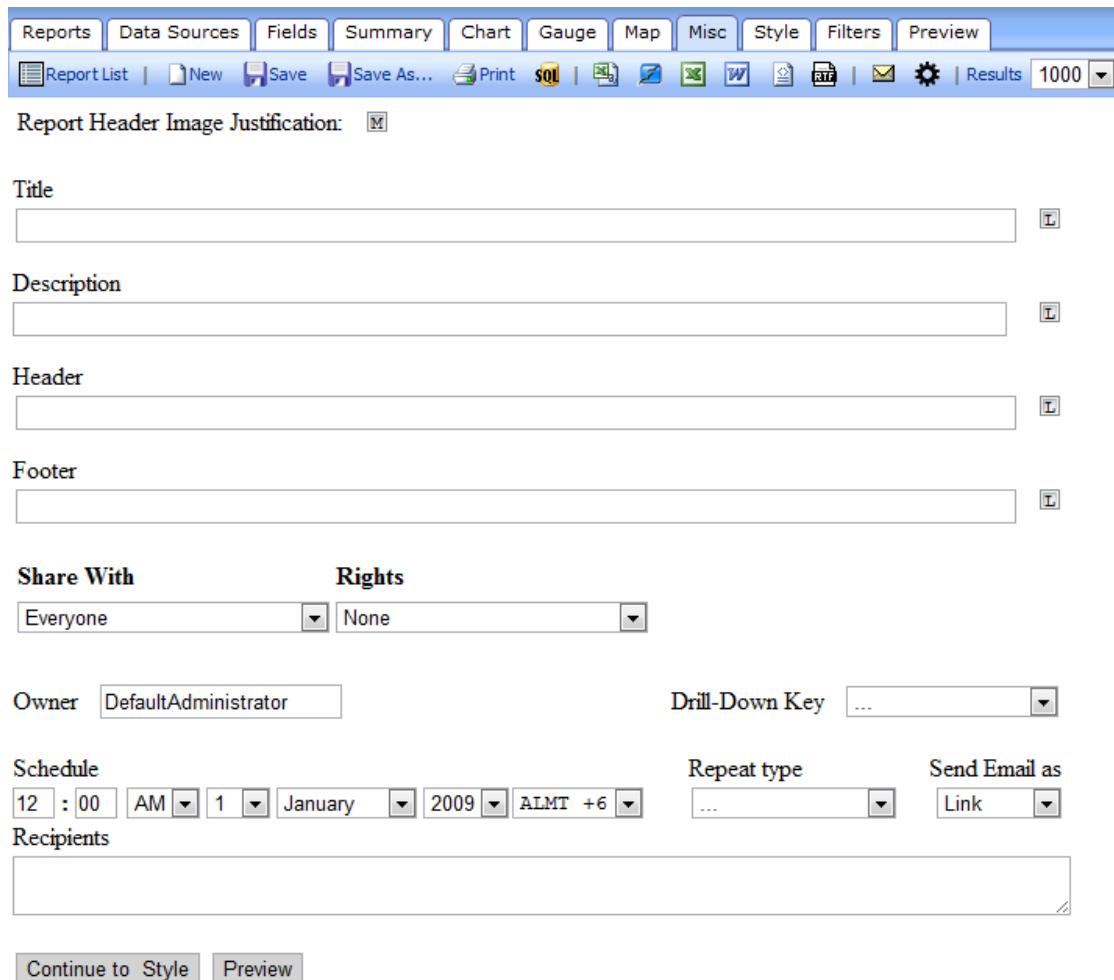
10.0 Misc Tab

In the Miscellaneous Tab (Misc Tab), you can add a title, description, header and footer to the report, all with left, middle, or right justification. Sharing and Scheduling are the two most popular features under this tab.

Feature	Description
Report Header Image Justification	Allows you to move the Report Header to the left, middle or right.
Title	Enter the title of the report. Examples below use "INSERT TEXT" as input. **INSERT TEXT** Ship Country Finland USA
Description	Enter a description for the report. INSERT TEXT Ship Country Finland USA
Header	Allows a user to set a report header. INSERT TEXT Ship Country Finland USA
Footer	Allows a user to set a report footer. Denmark Portugal INSERT TEXT

10.1 Scheduler

Schedule: Set the schedule date and time.

Repeat Type: Set the repeat frequency.

Send Email As: Sets the format in which the email is sent.

Recipients: Enter a comma separated list of recipients.

11.0 Toolbar And Preview

◀ Back | ▤ Report List | ▢ New | 💾 Save | 💾 Save As... | 📇 Print | 🔾 | 🗐 | 🗒 | 🗒 | 🗒 | 🗒 | ☒ | ☒ | ☑ | ☒ | �|⌨ | 🖼 | ☒ | ✉ | ⚙ | Results | 1000 ▼

Toolbar Buttons

The table below describes the functions of the Toolbar buttons.

Icons	Features	Description
◀ Back	Back	Goes to the browser's previous page.
▢ New	New	Creates a new report.
💾 Save	**Save**	Saves a report.
💾 Save As...	Save As	Allows a new report name to be saved.
📇 Print	Print (PDF Export)	Saves the report as a PDF document.
🔾 GO	IE	Runs the report in the web browser.
🗐	Schema	Display database diagram
🔲 SQL	SQL	Views the report in SQL mode.
🗒	CSV	Saves the report as a CSV file.
🗒	Excel Spread sheet	Saves the report as a MS-EXCEL file.
🗒 W	Word Document	Saves the report as a MS-Word document.
🗒	XML document	Saves the report as a XML document.
🗒	Open office document	Saves the report as an Open Office Document.
🗒 RTF	RTF document	Saves the report as a RTF document
🗒	Back to Report List	Takes you to the Report List screen.
✉	E-mail	E-mails a report to a client
⚙	Settings	Takes you to Settings.aspx page.

HROffice

11.1 Preview Tab

In the **Preview** tab (see image below), a preliminary version of the created table can be viewed, along with its Summary table, Chart(s), Map, Gauges, along with any other properties that have been set. Go back and change selections in the previous tabs and see how they affect the table by returning to it in the **Preview** tab.

Preview Tab

Finance Report

Financial Analysis of Freight Costs
ShipCountry = Canada,Mexico,USA

Canada

Ship City	Total	2010-Q3	2010-Q4	2011-Q1	2011-Q2	2011-Q3
Montréal	$1,394.22	$0.00	$88.89	$374.68	$203.27	$669.63
Tsawassen	$793.95	$0.00	$47.42	$70.22	$62.89	$0.00
Vancouver	$9.92	$0.00	$0.00	$0.00	$4.65	$0.94
	$2,198.09	$0.00	$136.31	$444.90	$270.81	$670.57

12.0 PIVOTS SECTION

The HROffice reports Pivot feature allows users to generate analytical data grids from within HROffice reports. The Pivot feature essentially adds extra pivot columns to the right side of the report. This is useful for comparing data over multiple categorical dimensions.

Below is an example of the Design and Output of a standard Pivot View of the Average Amount Spent on Freight.

12.1 Create a Simple Pivot Report.

1. Click on the "Data Sources" tab and select desired data sources. (Ex. Orders)

2. Click on the "Fields" tab. Select the desired Field(s) names & attributes (Sorting, VG, Function, & Format) for the report. (Ex. ShipCountry)

Before Pivot:

After Pivot:

Essentially, the pivot capability adds additional columns based on the data to the right of the report. In this example, the first column is essentially a standard report and the 2010, 2011, 2012 columns were added by the pivot capability.

Standard Report View:

Ship Country
UK
USA

Columns added by Pivot:

2010	2011	2012
$56.64	$39.62	$74.96
$85.75	$96.99	$153.32

12.2 Create an Advanced Pivot Report

Let's use these concepts to develop a more sophisticated report that shows us a monthly time-series report for each country visually grouped by employee.

In this report, we want to show the Top 5 companies that accounted for the most freight in 2011 and breakdown the analysis by month.

Here is what the design screen would look like for this report.

Finally, here are the results of the report with Pivot:

Country	Sum(Freight) ▼	2011 - Jan	2011 - Feb	2011 - Mar	2011 - Apr	2011 - May	2011 - Jun	2011 - Jul	2011 - Aug	2011 - Sep	2011 - Oct	2011 - Nov	2011 - Dec
Germany	$6,232.55	$109.03	$231.70	$49.05	$426.84	$1,440.95	$364.31	$430.69	$223.92	$906.18	$1,573.00	$3.52	$473.36
USA	$5,819.37	$17.05	$299.81	$791.89	$426.76	$40.18	$401.96	$1,043.70	$202.26	$1,040.44	$837.27	$441.80	$276.25
Austria	$3,745.65	$631.74	$47.94	$5.29	$789.95	$339.22	$26.06	$131.90	$477.90	$174.59	$272.47	$117.33	$731.26
France	$2,467.76	$114.85	$245.02	$70.72	$403.96	$205.78	$155.59	$28.63	$518.61	$175.83	$63.20	$75.58	$409.99
Brazil	$2,226.01	$297.37	$68.66	$147.33	$116.29	$68.65	$63.44	$155.33	$501.41	$146.70	$251.74	$59.96	$349.13
	$8,237.56	$1,399.77	$306.55	$235.92	$998.13	$482.68	$285.64	$711.13	$1,232.18	$321.29	$604.53	$421.02	$1,238.72

To make the report more consumable, you might also want to add highlighting to show the months with lows values.

For this, click on the Advanced Field Settings icon on the pivot field where you are calculating cell values, on the far right of the image below.

Then, set the Cell Highlight to 0 to 50: Red.

Text Highlight	
Cell Highlight	0 to 50: red
Value Ranges	example: 0 to 10:Under 10;10 to 100:10-100;

Here is the result:

Ship Country	Sum(Freight)	2011 - Jan	2011 - Feb	2011 - Mar	2011 - Apr	2011 - May	2011 - Jun	2011 - Jul	2011 - Aug	2011 - Sep	2011 - Oct	2011 - Nov	2011 - Dec
Argentina	$117.66	$29.83	$38.82	$0.00	$17.22	$8.12	$0.00	$0.00	$0.00	$0.00	$22.57	$0.00	$1.10
Austria	$3,745.65	$631.74	$47.94	$5.29	$789.95	$339.22	$26.06	$131.90	$477.90	$174.59	$272.47	$117.33	$731.26
Belgium	$460.48	$0.00	$147.06	$83.30	$0.00	$66.69	$0.00	$0.00	$6.20	$0.00	$0.00	$0.00	$157.23
Brazil	$2,226.01	$297.37	$68.66	$147.33	$116.29	$68.65	$63.44	$155.33	$501.41	$146.70	$251.74	$59.96	$349.13
Canada	$1,687.76	$440.83	$4.07	$0.00	$74.67	$0.00	$196.14	$423.90	$246.67	$0.00	$57.75	$243.73	$0.00
	$8,237.56	$1,399.77	$306.55	$235.92	$998.13	$482.68	$285.64	$711.13	$1,232.18	$321.29	$604.53	$421.02	$1,238.72

13.0 HROffice Maps

The HROffice Maps add-on provides interactive geographical visualization to the reporting experience.

In the report below, we are shading the colors of the states based on the sum of the freight, applying a hover over that shows the top products by state, and displaying an indicator bar on the location of the postal code while showing the number of orders vertically in the bar.
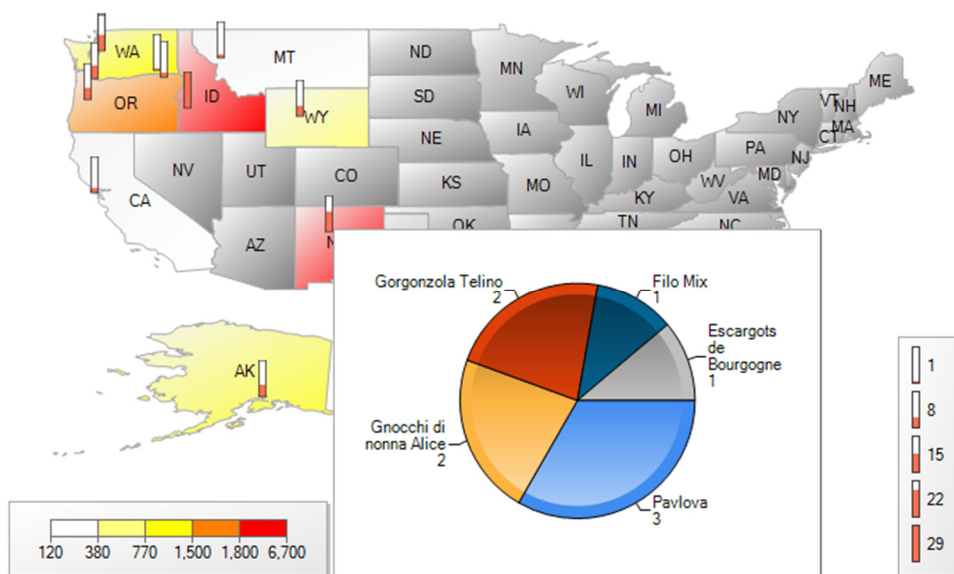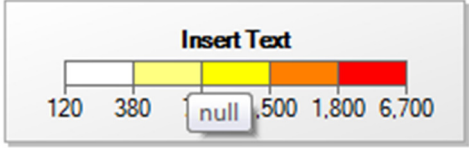
Feature	Description
Map Type	Map Type USA ▼ Zoom To Data ··· World Europe USA Shaded Region Australia
Zoom to Data	Zooms to the region or state the data is in
State	Select the field where state data is located
Shading	Selects the field and function you will use for shading
Fill Color From - To	Fills the color of the shading from a selected color to a selected color
Label (1st one displayed)	Sets the text displayed for the Legend **Insert Text** 120 380 null 500 1,800 6,700
Postal Code	Select the field where postal code data is located
Latitude / Longitude	Select the field where GIS data is located for lat/long
Value	Sets the field and function you will use in the indicator bar
Label (2nd one displayed)	**Insert Text** null 1 8 15 22 29